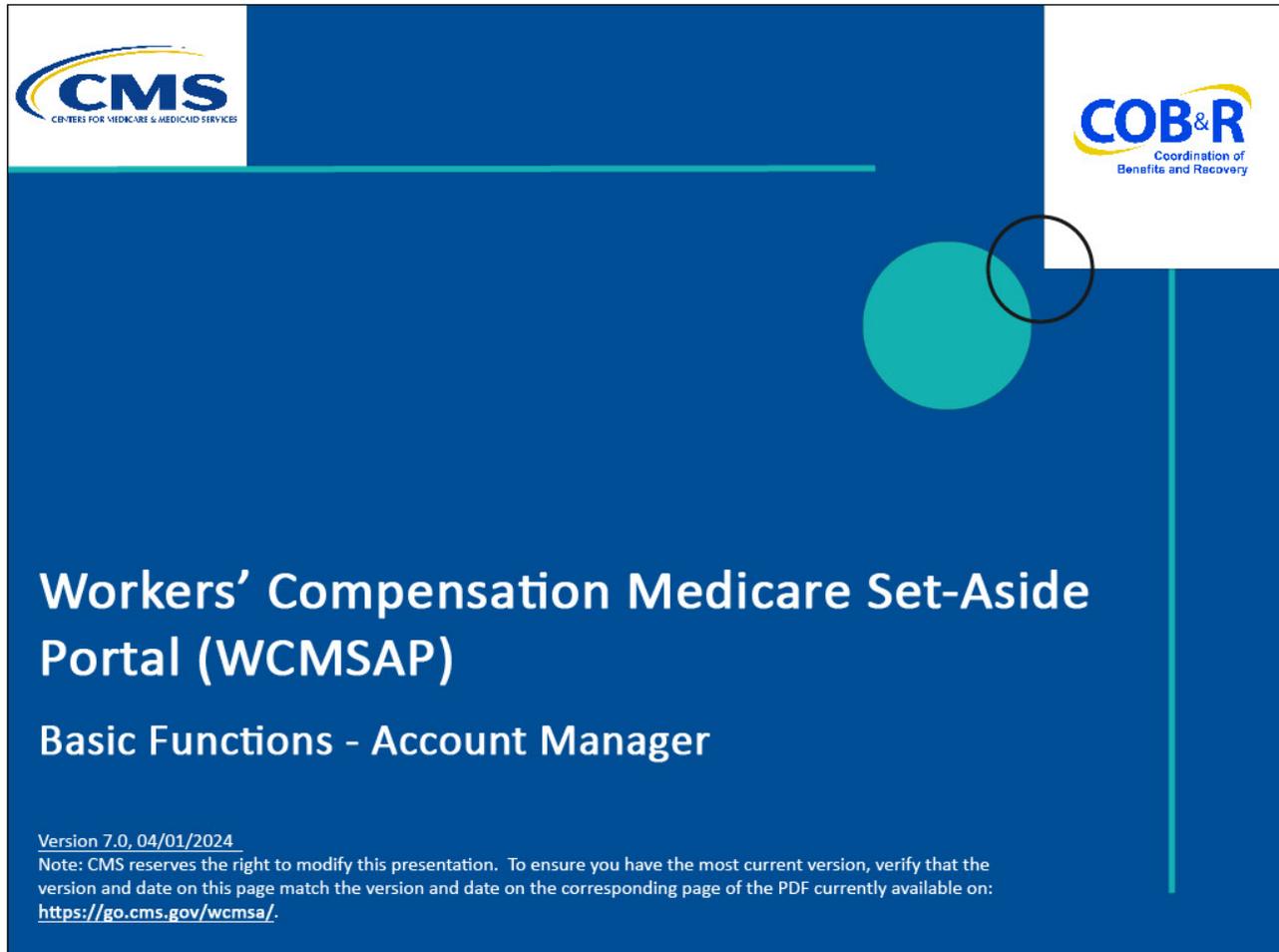


## Basic Functions - Account Manager

### Slide 1 - of 44 - Basic Functions - Account Manager



**CMS**  
CENTERS FOR MEDICARE & MEDICAID SERVICES

**COB&R**  
Coordination of  
Benefit and Recovery

# Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

## Basic Functions - Account Manager

Version 7.0, 04/01/2024  
Note: CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on:  
<https://go.cms.gov/wcmsa/>.

### Slide notes

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Basic Functions - Account Manager course.

**Slide 2 of 44 - Disclaimer**

## Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible for following the applicable CMS instructions found at the following link:

<https://www.cms.gov/medicare/coordination-benefits-recovery/workers-comp-set-aside-arrangements/portal>.

**Slide notes**

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP.

All affected entities are responsible for following the applicable CMS instructions found at the following link: [WCMSAP Website](#).

**Slide 3 of 44 - Course Overview**

## Course Overview

By the end of the course you will be able to:

- Identify the role of Account Manager
- Discuss the Basic Function of the Account Manager
  - Managing Account Profile
  - Conduct Designee Maintenance



**Slide notes**

By the end of this course, you will be able to identify the role of the Account Manager as well as the basic functions of the Account Manager including managing the account profile and conducting designee maintenance.

**Slide 4 of 44 - Account Manager Role**

**Account Manager - Role**

- Each WCMSAP account must have an Account Manager
  - Established during Account Setup
  - One per WCMSAP account
- Controls the administration of account and manages cases
- Registered user of system
- Has unlimited access to WCMSAP functionality
  - After they review, sign, and return profile report to the BCRC

**Slide notes**

Each WCMSAP account must have an assigned Account Manager. The Account Manager is established during the Account Setup process. Each WCMSAP account can have only one Account Manager.

This is the individual who controls the administration of an organization’s account and manages cases, which includes managing case access.

The Account Manager is a registered user of the system.

The Account Manager for Representative and Self accounts will have unlimited access to WCMSAP functionality and cases as soon as the Benefits Coordination & Recovery Center (BCRC) has received their signed profile report.

For Corporate and Professional Administrator account types, the Account Manager will only be granted access after the profile report is signed and returned by the Account Representative.

Slide 5 of 44 - Account Manager Role



Slide notes

The Account Manager for Self-account types is, by default, the submitter.

For Professional Administrators, Corporate and Representative account types, the Account Manager is assigned during the Account Setup process.

For Representative accounts, the submitter may be the Account Manager, but they have the option to assign the Account Manager role to another person.

**Slide 6 of 44 - Account Manager Basic Functions**

## Account Manager - Basic Functions

- Manages the account profile and updates account information
- Submits new cases
- Can view and update cases
- Can add or replace documentation
- Can invite Account Designees and can be Account Designee in another account
  - Corporate, Professional Administrators, or Representative account types only
- Can associate Account Designees to cases
- Can revoke Account Designees' access (e.g. due to account inactivity)
- Can submit a single case, for themselves or as Representative Payee
  - Self account types only

**Slide notes**

The Account Manager basic functions are: manages the WCMSAP account's profile information and updates general account information;

Submits new cases for the WCMSAP account they are associated with;

Can view and update all cases for the WCMSAP account they are associated with;

Can add or replace documentation to a specific case for the account;

Can invite other users to function as Account Designees and can be an Account Designee in another account (Account Designees are for Corporate, Professional Administrators, or Representative account types only);

Can associate an Account Designee to cases;

Can revoke Account Designee's' access to cases and/or an entire WCMSAP account;

Can submit a single case, as an Account Manager or as a Representative Payee. (For Self-account types only.);

To replace an Account Manager, the Account Representative for Corporate accounts, or the original submitter for Representative accounts, must contact the Electronic Data interchange (EDI) Department.

**Slide 7 of 44 - Account Manager Basic Functions**

## Professional Administrator - Account Manager Role

Responsible for inviting other employees to register on the Web Portal

May submit and receive transaction files on his own or invite Designees to assist as needed

**Slide notes**

As a Professional Administrator, the Account Managers Role includes inviting other employees to register on the Web Portal and managing their access and may submit and receive transaction files on his own or invite Designees to assist as needed.

Slide 8 of 44 - Welcome to WCMSAP

About This Site CMS Links How To... Reference Materials Contact Us

## Welcome to the WCMSAP

This site provides an interface for entry of Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals. Attorneys, Medicare beneficiaries, claimants, insurance carriers and WCMSA vendors may use this site to enter the case information directly. The site also provides attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track their submitted cases and the statuses without inquiry to the Benefits Coordination & Recovery Center (BCRC) or the Centers for Medicare & Medicaid Services (CMS).

For information about the availability of auxiliary aids and services, please visit: <http://www.medicare.gov/about-us/nondiscrimination/nondiscrimination-notice.html>

### WCMSAP Message

Attention Medicare Beneficiaries: If you are looking to submit an annual attestation electronically for your self-administered Medicare Set Aside (MSA), please be aware that you may do so by registering for and logging in to your Medicare.gov account. Using your Medicare.gov account connects you to the WCMSAP, making registration for a WCMSAP account unnecessary. Additional information on submitting attestations can be found in the Self-Administration Toolkit for WCMSAs.

### GETTING STARTED

For more information, refer to How To Get Started under the How To menu option.

**STEP 1** **STEP 2**

New Registration ➔ Account Setup ➔

(Account ID and P!N required)

#### Sign into your account

User Name:

[Forgot ID](#)

Password:

[Forgot Password](#)

Slide notes

To access a WCMSAP account and manage the case submission process, the Account Manager must first successfully login to the WCMSAP application.

Slide 9 of 44 - WCMSAP Home Page

**CMS** **Workers' Compensation Set-Aside Web Portal** **COB&R**  
Cooperation of Benefits and Recovery

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff Skip Nav

**QUICK HELP**  
[Help About This Page](#)

## WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

**Account Settings**

- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)

**Slide notes**

After a successful logon, the WCMSAP Home page will appear. From this page, the Account Manager can manage cases and manage account access.

Case access is controlled through the Account Settings. Although Account Managers have access to all of the Account Settings, the focus of this CBT is on Update Account Information and Designee Maintenance.

For more information on the other Account Settings, please see the Login and User Maintenance CBT.

Slide 10 of 44 - WCMSAP Home Page

**CMS** **Workers' Compensation Set-Aside Web Portal** **COB&R**  
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff Skip Nav

## WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

**QUICK HELP**  
[Help About This Page](#)

**Account Settings**

- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)

Slide notes

To revise account information, the Account Manager will click the Update Account Information link in the Account Settings box on the Home page.

Account Managers can grant Account Designees access to a case or revoke or remove an Account Designees access to a case or an entire account.

Slide 11 of 44 - Update Corporation Information

The screenshot displays the 'Update Corporate Information' page. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery), along with the title 'Workers' Compensation Set-Aside Web Portal'. A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. The main heading is 'Update Corporate Information', with a 'Print this page' icon to the right. Below the heading, a message states: 'You may edit the Corporate Account information or Account Representative information by clicking on the 'Edit' button of that section. You may not change the Account Type.' A 'QUICK HELP' box with a 'Help About This Page' link is on the right. The account type is 'Corporate'. Under 'Corporate Information', the EIN is 123456789 and the Corporate Name is ABC Company. An 'Edit' button is next to this section. The 'Business Mailing Address' section, highlighted with a red box, includes: Address Line 1: 200 Test Avenue, Address Line 2: Suite 2-B, City: Towson, State: Maryland, and Zip Code: 21204-3276. An 'Edit' button is next to it. The 'Account Representative Information' section, also highlighted with a red box, includes: First Name: Jane MI: A Last Name: Smith, Title: Director, E-Mail Address: jsmith@abcassociates.com, Phone: 410-832-8350 ext. 9877, and Fax: 410-832-8999. An 'Edit' button is next to this section. At the bottom, there are 'Previous', 'Submit Update', and 'Cancel' buttons. A footer bar contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

When the Update Account Information link is clicked, an Update Information page will appear.

The one pictured here, Update Corporate Information page, is what will display for Corporate users. This page lists the account's mailing address, and Account Representative contact information.

Please note: The Update Information screens for Representative and Self account types are very similar and function the same way.

**Slide 12 of 44 - Update Corporation Information**

The screenshot displays the 'Update Corporate Information' page on the CMS Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and the COB&R logo. A navigation bar contains links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. The main content area features a 'Print this page' button and a 'QUICK HELP' section with a 'Help About This Page' link. The 'Account Type' is set to 'Corporate'. The 'Corporate Information' section includes fields for Employer Identification Number (EIN: 123456789) and Corporate Name (ABC Company), with an 'Edit' button. The 'Business Mailing Address' section includes fields for Address Line 1 (200 Test Avenue), Address Line 2 (Suite 2-B), City (Towson), State (Maryland), and Zip Code (21204-3276), also with an 'Edit' button. The 'Account Representative Information' section includes fields for First Name (Jane), MI (A), Last Name (Smith), Title (Director), E-Mail Address (jsmith@abcassociates.com), Phone (410-832-8350 ext. 9877), and Fax (410-832-8999), with an 'Edit' button. At the bottom of the form, there are 'Previous', 'Submit Update', and 'Cancel' buttons. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

**Slide notes**

To make any corrections, click the Edit button next to the section that requires revisions to return to that page.

Note: If the Account Manager needs to replace their Account Representative with another person, they may do so by editing the Account Representative Information page.

Change or correct any of the information as needed. Once all corrections have been made, click Next at the bottom of the page to navigate back to the Update Corporate Information page.

After you have returned to the Update Information page, click the Next button.

The system will display a warning message when a change is made to the WCMSAP account information indicating that the updated information will be used for all future official communications.

**Slide 13 of 44 - Corporate Information Confirmation**

The screenshot shows the 'Corporate Information Update Confirmation' page. At the top, there are logos for CMS (Center for Medicare & Medicaid Services), 'Workers' Compensation Set-Aside Web Portal', and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. The main heading is 'Corporate Information Update Confirmation'. To the right, there is a 'Print this page' icon and a 'QUICK HELP' button with a 'Help About This Page' link. The main content area contains the following information:

Your corporate information has been updated. Print this page for your records.

Account Type: Corporate

<b>Corporate Information</b>	<b>Account Representative Information</b>
Employer Identification Number (EIN): 123456789	First Name: Jane MI: A Last Name: Smith
Corporate Name: ABC Company	Title: Director
	Date of Birth: 06/12/1968
<b>Business Mailing Address:</b>	E-Mail Address: jsmith@abcassociates.com
Address Line 1: 200 Test Avenue	Phone: 410- 832- 8350 ext. 9877
Address Line 2: Suite 2-B	Fax: 410- 832- 8999
City: Towson	
State: Maryland	
Zip Code: 21204- 3276	

At the bottom left, there is a 'Return to Home' button. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

**Slide notes**

Next, the system will display the Corporate Information Update Confirmation page, showing the updated information.

With the exception of a modification to an email address, the system will send an e-mail to the Account Manager, indicating that the account information has been changed.

Included in the email notification will be a profile report.

The Account Manager will be instructed to notify the BCRC if they did not initiate the update.

Click the Return to Home button to return to the WCMSAP Home page.

**Slide 14 of 44 - Update Account Information**

## Update Account Information

- When email address has been changed:
  - System sends email to old email address
  - Email recipient is instructed to
    - Click on link to proceed if they initiated change
    - Not click link and notify BCRC if they did not initiate change
  - If recipient clicks link, email is sent to new address

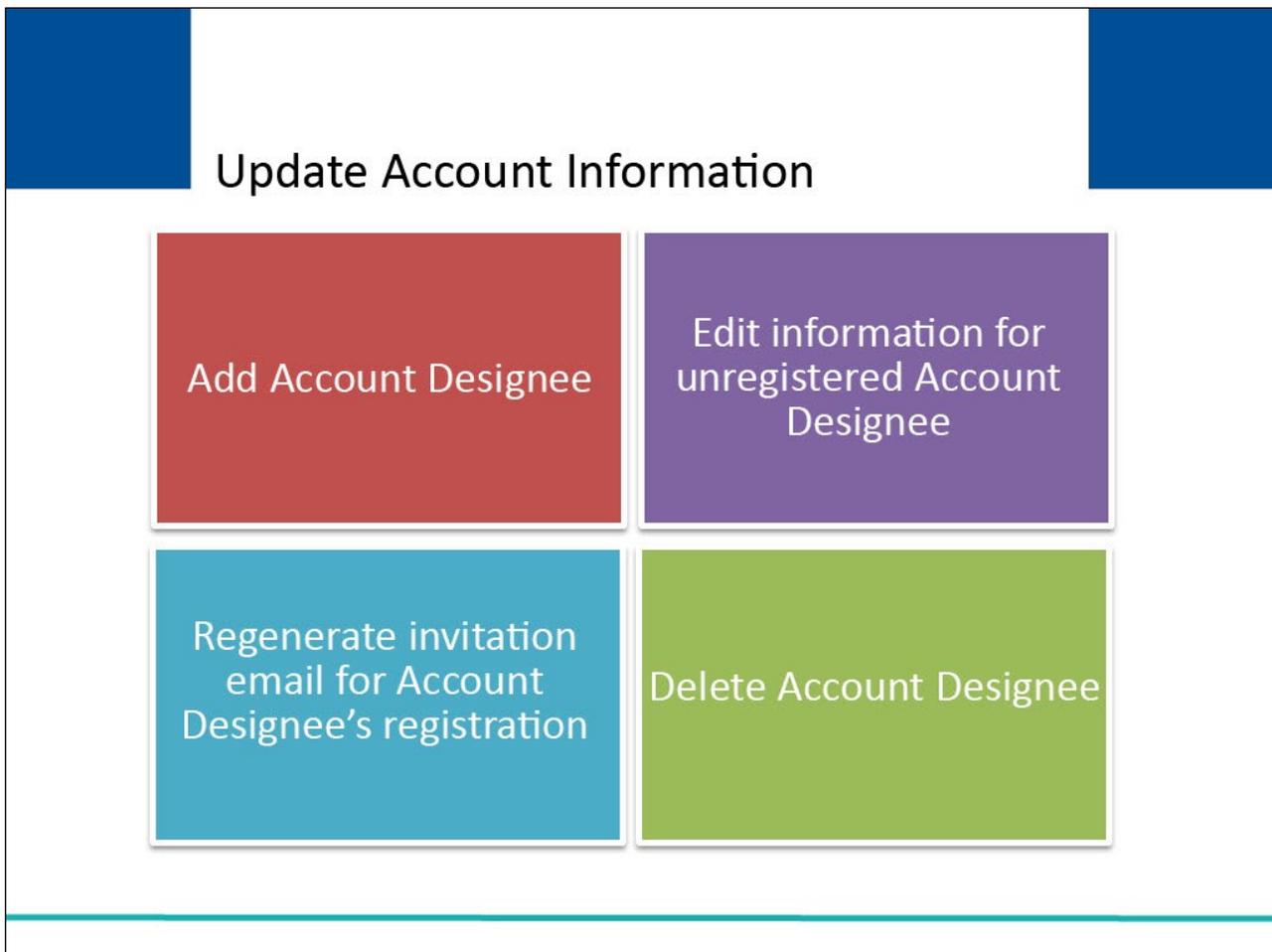
**Slide notes**

When an email address has been changed, the system will send an email to the old email address stating that an email address change has been requested.

The email recipient will be instructed to click on a link to proceed with the change, but only if they initiated the change.

The recipient will be instructed not to click the link and to notify the BCRC if they did not initiate the email address change. If the recipient clicks the link, an email reflecting the change will then be sent to the new email address.

**Slide 15 of 44 - Designee Maintenance**



The image shows a slide titled "Update Account Information" with a white background and blue header and footer bars. The title is centered at the top. Below the title are four colored rectangular buttons arranged in a 2x2 grid. The top-left button is red and contains the text "Add Account Designee". The top-right button is purple and contains the text "Edit information for unregistered Account Designee". The bottom-left button is light blue and contains the text "Regenerate invitation email for Account Designee's registration". The bottom-right button is light green and contains the text "Delete Account Designee".

**Slide notes**

For Corporate and Representative accounts, the Account Manager may designate one or more Account Designees to assist with case submission and management.

The Account Manager can perform the following Designee Maintenance functions:

- Add an Account Designee,

- Edit information for an unregistered Account Designee,

- Regenerate an invitation email with a token link for an Account Designee's registration,

and

- Delete an Account Designee.

Note: You can also change an Account Designee into an Account Manager by calling your EDI Representative.

Slide 16 of 44 - WCMSAP Home Page

**CMS** **Workers' Compensation Set-Aside Web Portal** **COB&R**  
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff Skip Nav

## WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

**QUICK HELP**  
[Help About This Page](#)

**Account Settings**

- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)

Slide notes

To manage Account Designees, the Account Manager will click the Designee Maintenance link from the Account Settings menu.

Slide 17 of 44 - Designee Listing

**CMS** Workers' Compensation Set-Aside Web Portal **COB&R**  
Coordination of Benefits and Recovery

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff Skip Navigation

### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

**QUICK HELP**  
[Help About This Page](#)

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text"/>				
X	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
X	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

CMS/HHS Vulnerability Disclosure Policy Privacy Policy User Agreement Adobe Acrobat

Slide notes

The Designee Listing page will appear. All Designees and their associated statuses (Pending, Active, Locked, Expired, Revoked) will be listed.

Slide 18 of 44 - Designee Listing

**Designee Listing**

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
X	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

[Add a Designee](#) [Return Home](#)

Slide notes

To add a potential Account Designee, the Account Manager must first invite them. To initiate this process, click Add a Designee.

**Slide 19 of 44 - Designee Information**

The screenshot shows the 'Designee Information' page of the Workers' Compensation Set-Aside Web Portal. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. The main heading is 'Designee Information'. Below this, instructions state: 'Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.' A note indicates that an asterisk (\*) denotes a required field. The form contains two text input fields: 'Designee E-mail Address: \*' and 'Re-enter Designee E-mail Address: \*'. Below the form are 'Previous' and 'Next' buttons. A 'QUICK HELP' box with a 'Help About This Page' link is located on the right. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

**Slide notes**

The Designee Information page appears. The Account Manager will enter and re-enter the email address of the Account Designee they wish to invite and then click Next to continue.

**Slide 20 of 44 - Designee Maintenance**

## Designee Maintenance

- System verifies that email is not in the database for existing user
- Existing user can be an Account Designee as long as
  - They are not registered as Account Representative for any Account ID
  - Are not the Account Manager for the same Account ID

**Slide notes**

When Next is clicked, the system will verify that the entered email address is not in the database for an existing user.

An existing, registered user can be an Account Designee for your Account ID as long as they are not already registered as an Account Representative for any Account ID, or the Account Manager for the same Account ID.

Slide 21 of 44 - Designee Invitation

The screenshot shows the 'Designee Invitation' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. Below the navigation bar, the page title 'Designee Invitation' is displayed. On the right side, there is a 'QUICK HELP' button with a link to 'Help About This Page'. The main content area contains instructions: 'Please provide the name and a pass-phrase for the designee to enter during the registration process.' and 'An asterisk (\*) indicates a required field.' There are four input fields: 'Designee First Name: \*', 'Designee Last Name: \*', 'Passphrase: \*', and 'Re-enter Passphrase: \*'. Below the fields, there are two paragraphs of text explaining the next steps and the consequences of clicking 'Previous' or 'Cancel'. At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next'. The 'Next' button is highlighted with a red border.

Slide notes

If the entered email address is found in the system (i.e., the invited Account Designee is already a registered user), the Designee Invitation page appears.

The Account Manager must verify and confirm that the information entered is for the correct Designee by clicking Next.

**Slide 22 of 44 - Designee Confirmation**

The screenshot shows the 'Designee Confirmation' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). The page title is 'Workers' Compensation Set-Aside Web Portal'. A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. The main heading is 'Designee Confirmation'. Below this, a paragraph states: 'The following Designee has been successfully added to the account. The designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. If the invited Designee is not currently a registered user, please contact the Designee and provide them with passphrase you created; the passphrase is necessary for them to complete registration.' The designee information is listed as: Designee First Name: Timothy, Designee Last Name: Baker, and Designee Email: tbaker@abc.com. At the bottom left, there are two buttons: 'Return Home' and 'Next', with the 'Next' button highlighted by a red box. On the right side, there is a 'QUICK HELP' section with a link 'Help About This Page'. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

**Slide notes**

The Designee Confirmation page will appear. This page confirms that the invited Designee has been added to the account. The Designee will be sent an email notifying them that they have been added to the Account ID. Click Next to continue.

Slide 23 of 44 - Active Status

**Designee Listing**

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<a href="#">Search</a>	<input type="text"/>				
<input checked="" type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input checked="" type="checkbox"/>	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat

Slide notes

The Designee Listing page will reappear. The new Designee will be listed with an "Active" Status.

Slide 24 of 44 - Designee Invitation

The screenshot shows the 'Designee Invitation' page of the 'Workers' Compensation Set-Aside Web Portal'. The page header includes the CMS logo (Centers for Medicare & Medicaid Services) and the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. A 'QUICK HELP' box with a 'Help About This Page' link is located on the right. The main content area contains the following text and form fields:

Please provide the name and a pass-phrase for the designee to enter during the registration process.

An asterisk (\*) indicates a required field.

Designee First Name: \*

Designee Last Name: \*

Passphrase: \*

Re-enter Passphrase: \*

When the user clicks Next they will be taken to a confirmation page stating that an invitation e-mail notifying Jane Doe to register on the WCMSAP Website will be sent to the provided E-Mail Address.

If the user clicks the Previous button, they will be taken to the Designee E-mail entry screen. If the user clicks Cancel from the pass-phrase entry screen, the action will be terminated and the Designee will not be added to the account.

OR

The e-mail address that you entered has been found, please verify this is the Designee you intended to invite. If the user clicks Continue they will be taken to a confirmation page that states that the designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. When they click Next they will be taken back to the Designee Listing Screen.

Buttons: Cancel Previous Next

Slide notes

If the Designee that is being invited is not a registered user (i.e., the entered email address is NOT found in the system), the Designee Invitation page will appear.

Slide 25 of 44 - Designee Invitation

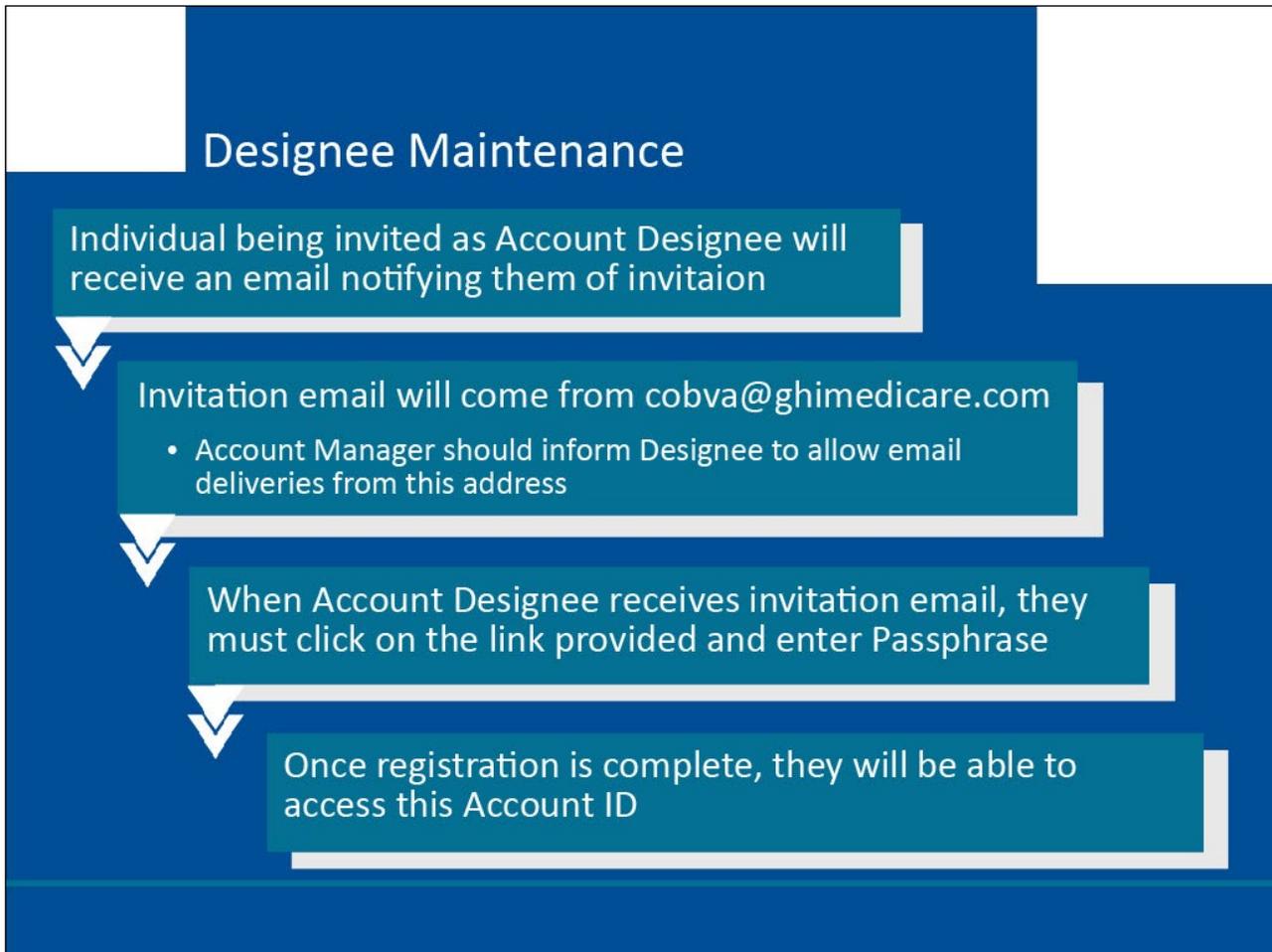
The screenshot shows the 'Designee Invitation' page of the CMS Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and the COB&R logo. A navigation bar contains links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. A 'QUICK HELP' box with a 'Help About This Page' link is located on the right. The main content area contains instructions: 'Please provide the name and a pass-phrase for the designee to enter during the registration process.' and 'An asterisk (\*) indicates a required field.' Below this is a form with four fields: 'Designee First Name: \*', 'Designee Last Name: \*', 'Passphrase: \*', and 'Re-enter Passphrase: \*'. Each field has a corresponding text input box. Below the form, there are two paragraphs of text explaining the next steps and the consequences of clicking 'Previous' or 'Cancel'. At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next'.

Slide notes

Unregistered individuals must first be invited to be an Account Designee before they can become an Account Designee.

When the Designee Invitation page appears, the Account Manager must enter the First and Last Name for the individual they are inviting to be an Account Designee, and create a Passphrase (a short, case-sensitive phrase, up to 30 characters). The Passphrase is entered twice.

The Account Manager must contact their Account Designee and provide them with the Passphrase. The Account Designee will need this passphrase in order to register.

**Slide 26 of 44 - Designee Maintenance****Slide notes**

Once the invitation process is complete, the individual being invited as an Account Designee will receive an email notifying them that they have been invited to be an Account Designee for the account.

The invitation email will come from [cobva@ghimedicare.com](mailto:cobva@ghimedicare.com). The Account Manager should inform the Designee to allow email deliveries from this address.

When the Account Designee receives the invitation email, they must click on the link provided in the email and enter the Passphrase that the Account Manager provided them with in order to successfully register for the WCMSAP.

Once the registration has been completed, they will be able to access this Account ID.

Slide 27 of 44 - Designee Invitation

The screenshot shows the 'Designee Invitation' page of the Workers' Compensation Set-Aside Web Portal. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. A 'QUICK HELP' box with a 'Help About This Page' link is located on the right. The main content area contains instructions: 'Please provide the name and a pass-phrase for the designee to enter during the registration process.' and 'An asterisk (\*) indicates a required field.' Below this are four text input fields: 'Designee First Name: \*', 'Designee Last Name: \*', 'Passphrase: \*', and 'Re-enter Passphrase: \*'. Further instructions state that clicking 'Next' leads to a confirmation page for Jane Doe, while clicking 'Previous' or 'Cancel' leads back to the previous screen. An 'OR' section follows, explaining that the email address has been found and that clicking 'Continue' leads to a confirmation page. At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next', with the 'Next' button highlighted with a red box.

Slide notes

Click Next to continue.

**Slide 28 of 44 - Designee Confirmation**

The screenshot shows the 'Designee Confirmation' page. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). The page title is 'Workers' Compensation Set-Aside Web Portal'. A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. The main heading is 'Designee Confirmation'. Below it, a paragraph states: 'The following Designee has been successfully added to the account. The designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. If the invited Designee is not currently a registered user, please contact the Designee and provide them with passphrase you created; the passphrase is necessary for them to complete registration.' The designee's details are listed: Designee First Name: Timothy, Designee Last Name: Baker, and Designee Email: tbaker@abc.com. At the bottom left, there are two buttons: 'Return Home' and 'Next', with the 'Next' button highlighted by a red box. On the right side, there is a 'QUICK HELP' section with a link 'Help About This Page'. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

**Slide notes**

The Designee Confirmation page will appear. Click Next to continue.

Slide 29 of 44 - Designee Listing

The screenshot displays the 'Designee Listing' page of the CMS Workers' Compensation Set-Aside Web Portal. The page includes a navigation bar with links like Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'QUICK HELP' button is also present. The main content area contains instructions on how to manage designees and a table listing the current designees. The table has columns for Delete, Last Name, First Name, E-mail Address, Passphrase, Status, and Last Login Date. Two designees are listed: Pam Jones with a 'Pending' status (highlighted in red) and Jane Doe with an 'Active' status. Below the table are buttons for 'Add a Designee' and 'Return Home'. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	Jones	Pam	pjones@abc.com	jones	Pending	
X	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

Slide notes

The Designee Listing page reappear. The new Account Designee is listed with a status of “Pending.”

**Slide 30 of 44 - Unregistered Account Designee**

## Edit Information for an Unregistered Account Designee

- Account Manager can edit personal information for “Pending” Account Designees
  - Have not yet registered on WCMSAP
- Account Manager can only view personal information for “Active” Account Designees
  - Cannot make changes to Account Designee’s information other than deleting them from the account

**Slide notes**

An Account Manager can edit personal information for Account Designees in “Pending” status.

Account Designees in “Pending” status have not yet registered on the WCMSAP. Account Managers can only view personal information for Designees in “Active” status.

Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Account Designee’s information other than deleting the Account Designee from the account.

Slide 31 of 44 - Designee Listing

**CMS** Workers' Compensation Set-Aside Web Portal **COB&R**  
COORDINATION OF BENEFITS AND RECOVERY

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff [Skip Navigation](#)

### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

**QUICK HELP**  
[Help About This Page](#)

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text"/>				
<input checked="" type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input checked="" type="checkbox"/>	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

[CMS/HHS Vulnerability Disclosure Policy](#) [Privacy Policy](#) [User Agreement](#) [Adobe Acrobat](#)

Slide notes

To make changes to the account of a particular Account Designee in "Pending" status, click the last name of the Designee whose information you wish to update.

Slide 32 of 44 - Update Designee Information

The screenshot shows the 'Update Designee Information' page. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main heading is 'Update Designee Information'. Below the heading, there is a 'QUICK HELP' button with a link to 'Help About This Page'. The main text instructs the user to click 'Next' to check the E-Mail Address and 'Previous' to return to the Designee Listing page. A note states that an asterisk (\*) indicates a required field. The form contains the following fields: Designee First Name (\* Pam), Designee Last Name (\* Jones), Designee E-mail Address (\* pjones@abc.com), Re-enter Designee E-mail Address (\* pjones@abc.com), Passphrase (\* jones), and Re-enter Passphrase (\* jones). A checkbox for 'Regenerate token' is checked. At the bottom of the form area, there are 'Previous' and 'Next' buttons, with 'Next' being highlighted with a red box. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

The Update Designee Information page appears, with the Designee’s personal information open for editing. Edit the “Pending” Account Designee’s information as needed. Click Next to continue.

Slide 33 of 44 - Designee Listings

**Workers' Compensation Set-Aside Web Portal**

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

**QUICK HELP**  
[Help About This Page](#)

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text"/>				
X	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
X	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

CMS/HHS Vulnerability Disclosure Policy Privacy Policy User Agreement Adobe Acrobat

Slide notes

The Designee Listing page reappears and the Designee's personal information will be updated.

**Slide 34 of 44 - Regeneration Invitation Email**

## Regenerate Invitation Email

- Email is generated when Account Manager invites Account Designee
  - Includes link for self-registration
- If Account Designee misplaces/deletes email or has not registered within 30 days
  - Account Manager can regenerate email
    - Only for Account Designees in “Pending” status
- Previous token link will not work once new email is generated
- Email will come from [cobva@ghimedicare.com](mailto:cobva@ghimedicare.com)

**Slide notes**

When the Account Manager invites a person to be an Account Designee, an email is generated and sent to the intended Designee informing them of the invitation and includes a link for them to access the WCMSAP site and self-register as an Account Designee.

If the intended Designee has misplaced or deleted the invitation email, or if the Account Designee has not registered within 30 days, the Account Manager can regenerate the invitation email, allowing the intended Account Designee to self-register.

The previously generated link will not work once a new email is generated. Invitation emails can only be regenerated for Account Designees in “Pending” status. The email will come from [cobva@ghimedicare.com](mailto:cobva@ghimedicare.com).

Slide 35 of 44 - Designee Listing

**Workers' Compensation Set-Aside Web Portal**

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	Jones	Pam	pjones@abc.com	jones	Pending	
X	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

Add a Designee Return Home

CMS/HHS Vulnerability Disclosure Policy Privacy Policy User Agreement Adobe Acrobat

Slide notes

On the Designee Listing page, click the last name of the Designee that needs the email regenerated.

Slide 36 of 44 - Update Designee Information

**CMS** Workers' Compensation Set-Aside Web Portal **COB&R**  
Center for Medicare & Medicaid Services Coordination of Benefits and Recovery

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff Skip Navigation

### Update Designee Information

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

Designee First Name: \* Pam

Designee Last Name: \* Jones

Designee E-mail Address: \* pjones@abc.com

Re-enter Designee E-mail Address: \* pjones@abc.com

Passphrase: \* jones

Re-enter Passphrase: \* jones

Regenerate token. Check this box if another invitation email must be sent to the Designee.

Previous Next

CMS/HHS Vulnerability Disclosure Policy Privacy Policy User Agreement Adobe Acrobat

Slide notes

The Update Designee Information page appears, with the Designee's personal information open for editing.

Slide 37 of 44 - Update Designee Information

**CMS** Workers' Compensation Set-Aside Web Portal **COB&R**  
Center for Medicare & Medicaid Services Coordination of Benefits and Recovery

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff Skip Navigation

### Update Designee Information

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

Designee First Name: \* Pam  
Designee Last Name: \* Jones  
Designee E-mail Address: \* pjones@abc.com  
Re-enter Designee E-mail Address: \* pjones@abc.com  
Passphrase: \* jones  
Re-enter Passphrase: \* jones

Regenerate token. Check this box if another invitation email must be sent to the Designee.

Previous Next

CMS/HHS Vulnerability Disclosure Policy Privacy Policy User Agreement Adobe Acrobat

Slide notes

Select the Regenerate token check box beneath the Designee’s personal information and then click Next.

Slide 38 of 44 - Designee Listing

**Workers' Compensation Set-Aside Web Portal**

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff Skip Navigation

### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

**QUICK HELP**  
[Help About This Page](#)

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text"/>				
<input checked="" type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input checked="" type="checkbox"/>	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

CMS/HHS Vulnerability Disclosure Policy Privacy Policy User Agreement Adobe Acrobat

Slide notes

The Designee Listing page reappears, with the Designee's information unchanged. However, the system re-generates the invitation email and sends it to the email address registered for the Account Designee.

Slide 39 of 44 - Designee Listing

**Workers' Compensation Set-Aside Web Portal**

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

### Designee Listing

**QUICK HELP**  
[Help About This Page](#)

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text"/>				
X	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
X	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

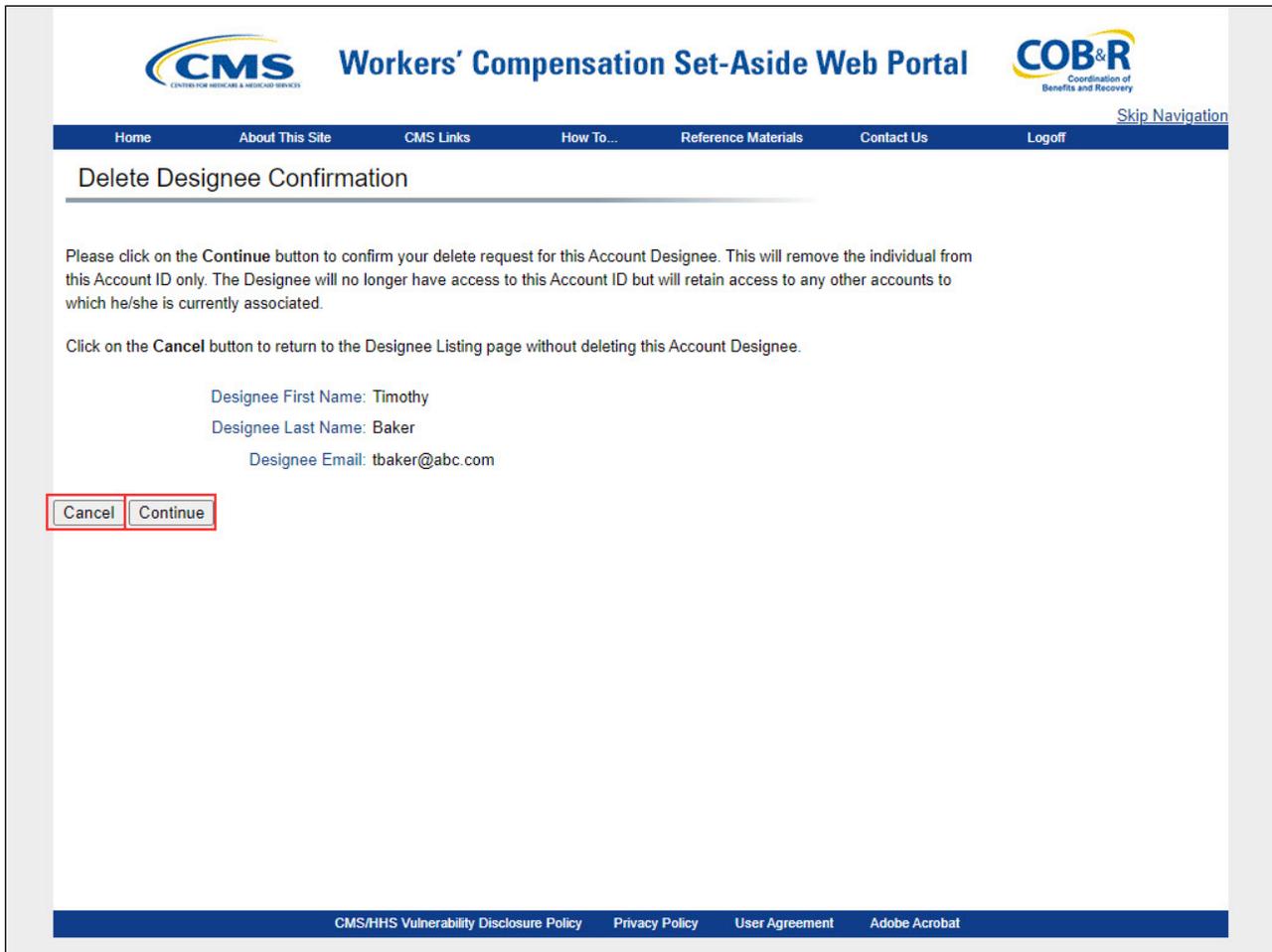
CMS/HHS Vulnerability Disclosure Policy Privacy Policy User Agreement Adobe Acrobat

Slide notes

To delete an Account Designee, click the X button next to the individual's name.

The Delete Designee Confirmation page will appear.

**Slide 40 of 44 - Delete Designee Confirmation**



**Slide notes**

If the Account Manager does not want to delete this Account Designee, they will click the Cancel button to return to the Designee Listing page which will show the Account Designee still listed with their status unchanged.

If the Account Manager does want to delete this Account Designee from the WCMSAP account, they will click the Continue button.

Slide 41 of 44 - Deleted Information Verification

**Designee Listing**

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	Jones	Pam	pjones@abc.com	jones	Pending	
X	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

Add a Designee Return Home

CMS/HHS Vulnerability Disclosure Policy Privacy Policy User Agreement Adobe Acrobat

Slide notes

This removes the Account Designee from this Account ID only. The deleted individual will no longer have access to this WCMSAP account.

However, the Account Designee will retain access to any other Account ID they are currently associated with. The Designee Listing page redisplayes without the Account Designee who was just deleted.

**Slide 42 of 44 - Course Summary**

## Course Summary

You are now be able to:

- Identify the role of Account Manager
- Discuss the Basic Function of the Account Manager
  - Managing Account Profile
  - Conduct Designee Maintenance



**Slide notes**

You are now able to identify the role of the Account Manager and the basic functions of the Account Manager including managing the account profile and conducting designee maintenance.

**Slide 43 of 44 - Conclusion**



You have completed the WCMSAP Basic Functions - Account Manager course. The information in this course can be referenced by using the document at the link below:

<https://www.cob.cms.hhs.gov/WCMSA/assets/wcmsa/userManual/WCMSAUserManual.pdf>

**Slide notes**

You have completed the WCMSAP Basic Functions - Account Manager course. The information in this course can be referenced by using the document at the link below.

<https://www.cob.cms.hhs.gov/WCMSA/assets/wcmsa/userManual/WCMSAUserManual.pdf>.

**Slide 44 of 44 - WCMSAP Training Survey**



If you have any questions or feedback on this material,  
please go to the following URL:

[https://www.surveymonkey.com/s/WCMSAPTraining.](https://www.surveymonkey.com/s/WCMSAPTraining)

**Slide notes**

If you have any questions or feedback on this material, please go to the following URL:  
[https://www.surveymonkey.com/s/WCMSAPTraining.](https://www.surveymonkey.com/s/WCMSAPTraining)